



Business Writing

Sample

Corporate Training Materials

All of our training products are fully customizable and are perfect for one day and half day workshops. You can easily update or insert your own content to make the training more relevant to participants. Our material is completely customizable and is backed up by a 90 day 100% no questions ask money back guarantee!

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United States

73 Greentree Drive, Box #68

Dover, Delaware 19904

Toll-free: 1-877-610-3660

Fax: 1-877-610-3661

sales@corporatetrainingmaterials.com

International

116 Provost Street

New Glasgow, NS, Canada

Phone: 001-902-695-3660

Fax: 001-902-695-3661

sales@corporatetrainingmaterials.com

Any technical issues or questions can be addressed by our support team

support@corporatetrainingmaterials.com

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Preface

What is Courseware?



Welcome to Corporate Training Materials, a completely new training experience!

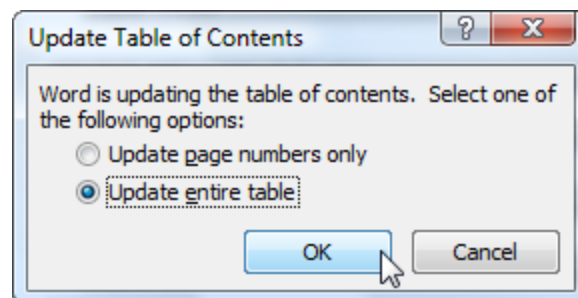
Our courseware packages offer you top-quality training materials that are customizable, user-friendly, educational, and fun. We provide your materials, materials for the student, PowerPoint slides, and a take-home reference sheet for the student. You simply need to prepare and train!

Best of all, our courseware packages are created in Microsoft Office and can be opened using any version of Word and PowerPoint. (Most other word processing and presentation programs support these formats, too.) This means that you can customize the content, add your logo, change the color scheme, and easily print and e-mail training materials.

How Do I Customize My Course?

Customizing your course is easy. To edit text, just click and type as you would with any document. This is particularly convenient if you want to add customized statistics for your region, special examples for your participants' industry, or additional information. You can, of course, also use all of your word processor's other features, including text formatting and editing tools (such as cutting and pasting).

To remove modules, simply select the text and press Delete on your keyboard. Then, navigate to the Table of Contents, right-click, and click Update Field. You may see a dialog box; if so, click "Update entire table" and press OK.

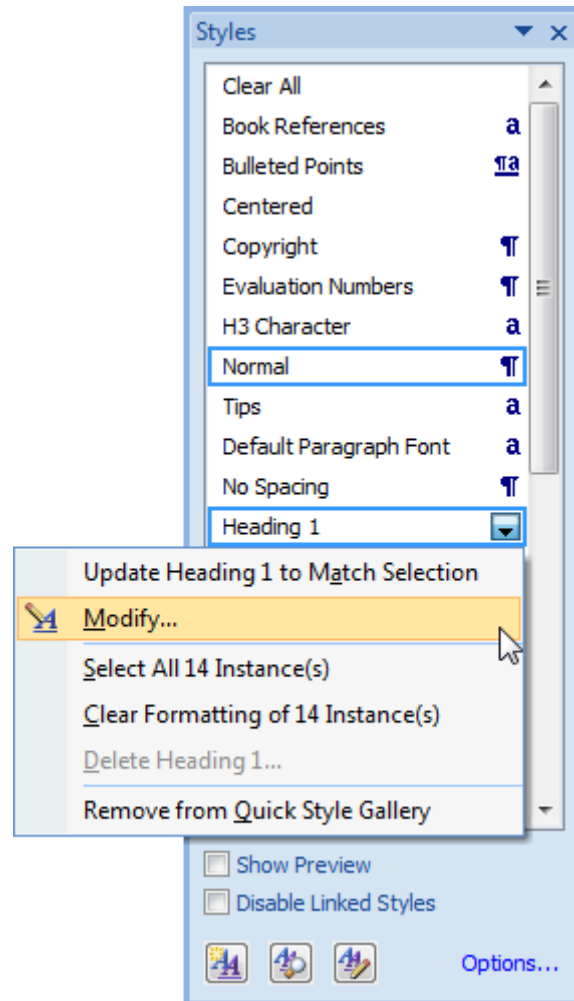


(You will also want to perform this step if you add modules or move them around.)

If you want to change the way text looks, you can format any piece of text any way you want. However, to make it easy, we have used styles so that you can update all the text at once.

If you are using Word 97 to 2003, start by clicking the Format menu followed by Styles and Formatting. In Word 2007 and 2010 under the Home tab, right-click on your chosen style and click Modify. That will then produce the Modify Style options window where you can set your preferred style options.

For example, if we wanted to change our Heading 1 style, used for Module Titles, this is what we would do:



Now, we can change our formatting and it will apply to all the headings in the document.

For more information on making Word work for you, please refer to [Word 2007 or 2010 Essentials](#) by Corporate Training Materials.

Materials Required

All of our courses use flip chart paper and markers extensively. (If you prefer, you can use a whiteboard or chalkboard instead.)

We recommend that each participant have a copy of the Training Manual, and that you review each module before training to ensure you have any special materials required. Worksheets and handouts are included within a separate activities folder and can be reproduced and used where indicated. If you would like to save paper, these worksheets are easily transferrable to a flip chart paper format, instead of having individual worksheets.

We recommend these additional materials for all workshops:

- Laptop with projector, for PowerPoint slides
- Quick Reference Sheets for students to take home
- Timer or watch (separate from your laptop)
- Masking tape
- Blank paper

Maximizing Your Training Power

We have just one more thing for you before you get started. Our company is built for trainers, by trainers, so we thought we would share some of our tips with you, to help you create an engaging, unforgettable experience for your participants.

- **Make it customized.** By tailoring each course to your participants, you will find that your results will increase a thousand-fold.
 - Use examples, case studies, and stories that are relevant to the group.
 - Identify whether your participants are strangers or whether they work together. Tailor your approach appropriately.
 - Different people learn in different ways, so use different types of activities to balance it all out. (For example, some people learn by reading, while others learn by talking about it, while still others need a hands-on approach. For more information, we suggest Experiential Learning by David Kolb.)
- **Make it fun and interactive.** Most people do not enjoy sitting and listening to someone else talk for hours at a time. Make use of the tips in this book and your own experience to keep your participants engaged. Mix up the activities to include individual work, small group work, large group discussions, and mini-lectures.
- **Make it relevant.** Participants are much more receptive to learning if they understand why they are learning it and how they can apply it in their daily lives. Most importantly, they want to know how it will benefit them and make their lives easier. Take every opportunity to tie what you are teaching back to real life.
- **Keep an open mind.** Many trainers find that they learn something each time they teach a workshop. If you go into a training session with that attitude, you will find that there can be an amazing two-way flow of information between the trainer and trainees. Enjoy it, learn from it, and make the most of it in your workshops.

And now, time for the training!

Icebreakers

Each course is provided with a wide range of interactive Icebreakers. The trainer can utilize an Icebreaker to help facilitate the beginning of the course, as it helps “break the ice” with the participants. If the participants are new to each other, an icebreaker is a great way to introduce everyone to each other. If the participants all know each other it can still help loosen up the room and begin the training session on positive note. Below you will see one of the icebreakers that can be utilized from the Icebreakers folder.

Icebreaker: Friends Indeed

Purpose

Have the participants moving around and help to make introductions to each other.

Materials Required

- Name card for each person
- Markers

Preparation

Have participants fill out their name card. Then, ask participants to stand in a circle, shoulder to shoulder. They should place their name card at their feet. Then they can take a step back. You as the facilitator should take the place in the center of the circle.

Activity

Explain that there is one less place than people in the group, as you are in the middle and will be participating. You will call out a statement that applies to you, and anyone to whom that statement applies must find another place in the circle.

Examples:

- Friends who have cats at home
- Friends who are wearing blue
- Friends who don't like ice cream

The odd person out must stand in the center and make a statement.

The rules:

- You cannot move immediately to your left or right, or back to your place.
- Let's be adults: no kicking, punching, body-checking, etc.

Play a few rounds until everyone has had a chance to move around.

Training Manual Sample

On the following pages is a sample module from our Training Manual. Each of our courses contains twelve modules with three to five lessons per module. It is in the same format and contains the same material as the Instructor Guide, which is then shown after the Training Manual sample, but does not contain the Lesson Plans box which assists the trainer during facilitation.

The Training Manual can be easily updated, edited, or customized to add your business name and company logo or that of your clients. It provides each participant with a copy of the material where they can follow along with the instructor.

*Organizing is what you do before
you do something, so that when
you do it, it's not all mixed up.*

A. A. Milne

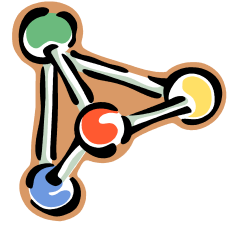
Sample Module: Writing Meeting Agendas



Time is a precious commodity in business; you cannot afford to have discussions go all over the place. This is why agendas are an integral part in keeping meetings focused, organized, and flowing well. In this module, we will discuss the basic structure of agendas, how to select an agenda format and tips and techniques when writing an agenda.

The Basic Structure

An agenda is a list of the topics for discussion in a meeting, alongside with details that can help the meeting run successfully. It keeps the discussion on track and the meeting within schedule. When included in the invitation, an agenda is a way to brief participants on how they should prepare for the meeting and what they should bring.



The basic structure of an agenda includes:

- Date, Time, Location, and Estimated Duration of the Meeting
- Purpose of the Meeting
- Advanced Preparation Guidelines

List down what invitees need to review or think about before the meeting so that the discussion can be more targeted and productive. This is also the section to advise attendees what they need to bring to the meeting. Example: “Please have a copy of the 2005 Financial Report with you.”

- List of Invited (or Confirmed) Attendees
- Items for Discussion

It is recommended that you state items for discussion using results-oriented action words. Example: “Decide on which vendor to award Sunrise account to.” is a better agenda item than “Sunrise Account” or “Talk about Sunrise bidders.”

- Person-in-Charge for each item
- Approximate Time to be spent on each item

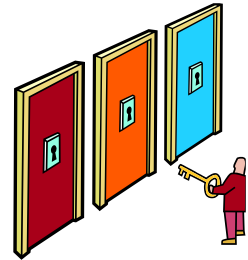
Below is an excerpt from a meeting agenda:

AGENDA MEETING ON IMPROVING EMPLOYEE RETENTION FOR 2010 SMITH SALES AND MARKETING CORPORATION		
Date: July 14, 2009 Place: ABC Conference Hall		Estimated Start Time: 04:00 pm Estimated Ending Time: 05:00 pm
Purpose of the Meeting: a. To present the highlights of the 'Survey on Employee Loyalty and Commitment' conducted last month. b. To draft an action plan based on the results of the survey.		
Invited Attendees: 1. Mark Spencer (MS) 4. Victoria Teasdale (VT) 2. Louis Walsh (LW) 5. Mary Beth Cole (MBC) 3. Joseph Barlow (JB) 6. Howard Donald (HD)		
Advanced Preparation Reminders: Please review the results of the 'Survey on Employee Loyalty and Commitment' sent to you via email last Friday. Also, please come up with suggestions on how we can incorporate insights from the survey into next year's Employee Retention Program		
Item	Person-in-Charge	Estimated Duration
1. Present the highlights of the survey results.	VT	10 minutes
2. Discuss the implications of the results.	LW	15 minutes

Choosing a Format

There are many different formats of a meeting agenda, although very few stray from the basic structure discussed earlier. Word processing software, like Microsoft Word, offers agenda templates and agenda wizards for you to use.

The agenda format to use depends on:



When the attendees are going to view the agenda: Most agendas are distributed days before the meeting (which is recommended). There are cases, however, when an emergency meeting has to be called, and the agenda is sent on the meeting day/ hour itself. If it's the latter case, write the agenda in outline form; this way it can be easily reviewed in the shortest time.

The context of the meeting: Some meetings happen regularly, for example a monthly Board of Directors Meeting. In this case, sections on 'Matters Resolved the Previous Meeting' or "Matters Arising from the Previous Meeting" may be appropriate for the meetings to have a good flow.

Agendas for meetings that happen regularly may not be as detailed as other agendas, as there is the presumption that regular attendees can easily make out what basic outlines and basic tags mean. The attendees' level of familiarity with the items in the agenda can also dictate how detailed and how formal an agenda should be.

The purpose of the agenda: Your purpose in sending out an agenda can influence what format you should use.

Some agendas are meant as an invitation to potential meeting attendees. In this case you can include sections on how you perceive their input on the discussion would help.

Some agendas are meant as orientations. For example, The Toastmasters' Club issue agendas to inform their invitees what would happen in an event. They write the agenda in the second person, e.g. "This is the section where you discuss what happened in the last symposium..."

Writing the Agenda

When writing the agenda, consider the following factors:



- **Priority of Items**
 - Consult everyone involved in the meeting what topics should be included in the agenda. At least, seek confirmation from your team if the agenda is accurate and complete.
 - Rank the topics in descending order of importance and urgency. This way, it's the less priority topics that get sacrificed in case there's no more time.

- **Logical Flow**
 - Start with topics arising from the previous meeting before new stuff, unless new issues are more important.
 - Combine items that are related and or similar.
 - Start with 'informational items' first, before items that require critical thinking and decision-making.
 - Allot time for questions.
 - Close with a wrap-up session.

- **Timing**
 - Plan for only 30 minutes to 1 hour and 30 minutes. Anything longer tends to be unproductive because of attendees' fatigue.
 - Be reasonable in setting the time that will spent on each topic. If the discussion has to be really focused, state in the agenda what precisely would be discussed. You may also advise attendees what they need to prepare beforehand to get the discussion flowing faster.

Instructor Guide Sample

On the following pages is a sample module from our Instructor Guide. It provides the instructor with a copy of the material and a Lesson Plans box. Each Instructor Guide and Training Manual mirrors each other in terms of the content. They differ in that the Instructor Guide is customized towards the trainer, and Training Manual is customized for the participant.

The key benefit for the trainer is the Lesson Plan box. It provides a standardized set of tools to assist the instructor train that particular lesson. The Lesson Plan box gives an estimated time to complete the lesson, any materials that are needed for the lesson, recommended activities, and additional points to assist in delivering the lessons such as Stories to Share and Delivery Tips.

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you do it, it's not all mixed up.*

A. A. Milne

Sample Module: Writing Meeting Agendas

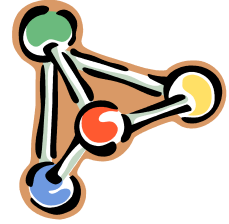


Time is a precious commodity in business; you cannot afford to have discussions go all over the place. This is why agendas are an integral part in keeping meetings focused, organized, and flowing well. In this module, we will discuss the basic structure of agendas, how to select an agenda format and tips and techniques when writing an agenda.

The Basic Structure

Estimated Time	15 minutes
Topic Objective	<p>To define what an agenda is.</p> <p>To list down information that makes the basic structure of an agenda.</p> <p>To create an agenda using the basic structure.</p>
Topic Summary	<p>An agenda is a list of the topics for discussion in a meeting, alongside details that can help the meeting run successfully.</p> <p>The basic structure of an agenda includes:</p> <ul style="list-style-type: none">• Date, Time, Location, and Estimate Duration of the Meeting• Purpose of the Meeting• Advanced Preparation Guidelines• List of Attendees• Items for Discussion• Person-in-Charge for each item• Approximate Time to be spent on each item
Materials Required	Flow chart paper and markers Worksheet Four: Writing Agendas
Planning Checklist	<p>Print a copy of the worksheet on agenda writing for each participant.</p> <p>Decide ahead of time how you're going to divide the groups.</p>
Recommended Activity	<p>Divide the participants into groups of 3-5 members. Tell each group that their organization is about to have a meeting, to discuss whether they should conduct a Business Writing workshop for their staff.</p> <p>Give each group a copy of the template for Meeting Agendas. Ask them to fill the template up based on what they think should be included in the agenda. In the interest of time, limit the items for discussion to 3 items.</p> <p>Ask the plenary what they found easy and difficult in the exercise.</p>
Delivery Tips	Illustrate how each of the sections of the agenda should be filled out.
Review Questions	Give 3 items that should be included in a meeting agenda.

An agenda is a list of the topics for discussion in a meeting, alongside with details that can help the meeting run successfully. It keeps the discussion on track and the meeting within schedule. When included in the invitation, an agenda is a way to brief participants on how they should prepare for the meeting and what they should bring.



The basic structure of an agenda includes:

- Date, Time, Location, and Estimated Duration of the Meeting
- Purpose of the Meeting
- Advanced Preparation Guidelines

List down what invitees need to review or think about before the meeting so that the discussion can be more targeted and productive. This is also the section to advise attendees what they need to bring to the meeting. Example: “Please have a copy of the 2005 Financial Report with you.”

- List of Invited (or Confirmed) Attendees
- Items for Discussion

It is recommended that you state items for discussion using results-oriented action words. Example: “Decide on which vendor to award Sunrise account to.” is a better agenda item than “Sunrise Account” or “Talk about Sunrise bidders.”

- Person-in-Charge for each item
- Approximate Time to be spent on each item

Below is an excerpt from a meeting agenda:

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Advanced Preparation Reminders: Please review the results of the 'Survey on Employee Loyalty and Commitment' sent to you via email last Friday. Also, please come up with suggestions on how we can incorporate insights from the survey into next year's Employee Retention Program		
Item	Person-in-Charge	Estimated Duration
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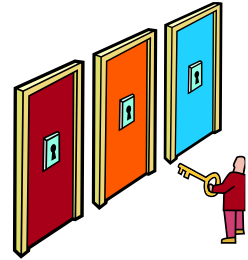
Choosing a Format

Estimated Time	5 minutes
Topic Objective	To list basic guidelines on how to choose an agenda format.
Topic Summary	<p>The format of your meeting agenda can be influenced by:</p> <ul style="list-style-type: none">a. When the attendees are going to view the agenda.b. The context of the meeting.c. The purpose of the agenda.
Materials Required	<p>Flip chart paper and markers</p> <p>Copies of agendas with different formats.</p>
Planning Checklist	Gather 2-3 copies of agendas with different formats to show the group. You have the option of printing each participant a copy, having a couple of copies passed around for inspection or projecting the agenda onscreen using an overhead projection. Prepare according to your chosen methodology.
Recommended Activity	Distribute copies of agendas with different formats to expose the participants on what agenda formats are around.
Delivery Tips	<p>Emphasize that there are no correct or incorrect agenda formats. At the end of the day, it's about which format would help bring out the best in your meeting.</p> <p>The purpose of showing participants copies of agendas is exposure to different formats. You do not need to allot considerable time for them to study each format. Just point out basic differences among the samples.</p>
Review Questions	State one factor that can influence what agenda format you should use.

There are many different formats of a meeting agenda, although very few stray from the basic structure discussed earlier. Word processing software, like Microsoft Word, offers agenda templates and agenda wizards for you to use.

The agenda format to use depends on:

When the attendees are going to view the agenda: Most agendas are distributed days before the meeting (which is recommended). There are cases, however, when an emergency meeting has to be called, and the agenda is sent on the meeting day/ hour itself. If it's the latter case, write the agenda in outline form; this way it can be easily reviewed in the shortest time.



The context of the meeting: Some meetings happen regularly, for example a monthly Board of Directors Meeting. In this case, sections on 'Matters Resolved the Previous Meeting' or "Matters Arising from the Previous Meeting" may be appropriate for the meetings to have a good flow.

Agendas for meetings that happen regularly may not be as detailed as other agendas, as there is the presumption that regular attendees can easily make out what basic outlines and basic tags mean. The attendees' level of familiarity with the items in the agenda can also dictate how detailed and how formal an agenda should be.

The purpose of the agenda: Your purpose in sending out an agenda can influence what format you should use.

Some agendas are meant as an invitation to potential meeting attendees. In this case you can include sections on how you perceive their input on the discussion would help.

Some agendas are meant as orientations. For example, The Toastmasters' Club issue agendas to inform their invitees what would happen in an event. They write the agenda in the second person, e.g. "This is the section where you discuss what happened in the last symposium..."

Writing the Agenda

Estimated Time	10 minutes
Topic Objective	To present guidelines in writing the agenda.
Topic Summary	<p>When writing the agenda, consider:</p> <ul style="list-style-type: none">a. Priority of Itemsb. Logical Flowc. Timing
Materials Required	Flip chart paper markers
Recommended Activity	Ask the participants to recall the earlier activity where they created agendas in small groups. Ask them if they have insights, from that activity, on how to write an effective agenda. Tie their insights with the guidelines for discussion.
Review Questions	What are the three factors you should consider when writing the agenda?

When writing the agenda, consider the following factors:



- **Priority of Items**
 - Consult everyone involved in the meeting what topics should be included in the agenda. At least, seek confirmation from your team if the agenda is accurate and complete.
 - Rank the topics in descending order of importance and urgency. This way, it's the less priority topics that get sacrificed in case there's no more time.

- **Logical Flow**
 - Start with topics arising from the previous meeting before new stuff, unless new issues are more important.
 - Combine items that are related and or similar.
 - Start with 'informational items' first, before items that require critical thinking and decision-making.
 - Allot time for questions.
 - Close with a wrap-up session.

- **Timing**
 - Plan for only 30 minutes to 1 hour and 30 minutes. Anything longer tends to be unproductive because of attendees' fatigue.
 - Be reasonable in setting the time that will spent on each topic. If the discussion has to be really focused, state in the agenda what precisely would be discussed. You may also advise attendees what they need to prepare beforehand to get the discussion flowing faster.

Activities

During the facilitation of a lesson Worksheet or Handout may be utilized to help present the material. If a lesson calls for a Worksheet or Handout it will be listed in the Lesson Plan box under Materials Required. The trainer can then utilize the Activities folder for the corresponding material and then provide it to the participants. They are all on separate Word documents, and are easily edited and customized.

Below you will see the Worksheets or Handouts that are utilized during the training of the above lesson. They are located in the Activities folder and can be easily printed and edited for the participants.

Sample Worksheet: Writing Agenda

AGENDA TITLE OF THE MEETING ORGANIZATION NAME		
Date:		Estimated Start Time:
Place:		Estimated Ending Time:
Purpose of the Meeting:		
Invited (or Confirmed) Attendees:		
1.	4.	
2.	5.	
3.	6.	
Advanced Preparation Reminders:		
Item	Person-in-Charge	Estimated Duration
1.		
2.		
3.		
4.		
5.		
6.		
7.		

Quick Reference Sheets

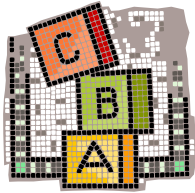
Below is an example of our Quick reference Sheets. They are used to provide the participants with a quick way to reference the material after the course has been completed. They can be customized by the trainer to provide the material deemed the most important. They are a way the participants can look back and reference the material at a later date.

They are also very useful as a take-away from the workshop when branded. When a participant leaves with a Quick Reference Sheet it provides a great way to promote future business.

Business Writing

Types of Sentences

1. **Declarative:** The most commonly used sentence type in business writing, these are sentences that make a statement. They end with a period.
2. **Interrogative:** These are sentences that ask a question. They end in a question mark. Interrogative questions don't necessarily follow the format of subject + predicate.
3. **Imperative:** These are sentences that give a command or make a request. They usually end with a period, though sometimes they can end with an exclamation point (although to do so is not recommended in business writing).
4. **Exclamatory:** These are sentences that express strong feeling. They usually end with an exclamation mark.



Writing the Letter

Tips on how to write a business letter:

- Keep your purpose in mind when writing a business letter. There are many types of business letters (e.g. letter of inquiry, letter of application, letter of announcement, letter of congratulations) and each type has suggested content and formats.
- Write with a positive tone. Even if the subject of your letter is unpleasant, it is important to remain courteous and tactful. Building and sustaining goodwill is imperative in all business.
- Follow standard spelling and grammar rules, even if your letter is informal. At the end of the day, you're still writing for business and you should never leave your professional personal behind.
- Personalize your business letter. While there is a generic template for almost every situation, it still speaks well of you if you can make your letters targeted to your recipient.



How Peer Review Can Help

Peer review is the process of submitting your work to the scrutiny of another writer, an expert, or a fellow member of your team, with the goal of getting constructive feedback. Peer review can be done 'blindly', with the identity of the writers kept from the reviewer or in a more open fashion.

The writer gains insight on the quality of their writing, or at least how their work comes across to one reader. They also get advice on the strengths and weaknesses of their writing, from someone presumably working in the same context that they do. This advice can help them improve both present and future work.



Certificate of Completion

Every course comes with a Certificate of Completion where the participants can be recognized for completing the course. It provides a record of their attendance and to be recognized for their participation in the workshop.

CERTIFICATE OF COMPLETION

[Name]

Has mastered the course

Business Writing

Awarded this _____ day of _____, 20____

Presenter Name and Title

PowerPoint Sample

Below you will find the PowerPoint sample. The slides are based on and created from the Training Manual. PowerPoint slides are a great tool to use during the facilitation of the material; they help to focus on the important points of information presented during the training.

Sample Module: Writing Meeting Agendas

Time is a precious commodity in business; you cannot afford to have discussions go all over the place. This is why agendas are an integral part in keeping meetings focused, organized, and flowing well. In this module, we will discuss the basic structure of agendas, how to select an agenda format and tips and techniques when writing an agenda.

Organizing is what you do before you do something, so that when you do it, it's not all mixed up.

A. A. Milne

The Basic Structure

- Date, Time, Location, and Estimated Duration of the Meeting
- Purpose of the Meeting
- Advanced Preparation Guidelines
- List of Invited (or Confirmed) Attendees
- Items for Discussion
- Person-in-Charge for each item
- Approximate Time to be spent on each item



Choosing a Format

- **When the attendees are going to view the agenda:** Most agendas are distributed days before the meeting. Write the agenda in outline form; this way it can be easily reviewed in the shortest time.
- **The context of the meeting:** Some meetings happen regularly, for example a monthly Board of Directors Meeting. In this case, sections on 'Matters Resolved the Previous Meeting' or "Matters Arising from the Previous Meeting" may be appropriate for the meetings to have a good flow.
- **The purpose of the agenda:** Your purpose in sending out an agenda can influence what format you should use.



Writing the Agenda

When writing the agenda, consider the following factors:

- **Priority of Items**
 - Consult everyone involved in the meeting.
 - Rank the topics in descending order of importance and urgency.
- **Logical Flow**
 - Start with topics arising from the previous meeting before new stuff, unless new issues are more important.
 - Combine items that are related and or similar.
 - Start with 'informational items' first, before items that require critical thinking and decision-making.
 - Allot time for questions.
 - Close with a wrap-up session.
- **Timing**
 - Plan for only 30 minutes to 1 hour and 30 minutes.
 - Be reasonable in setting the time that will spent on each topic.



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